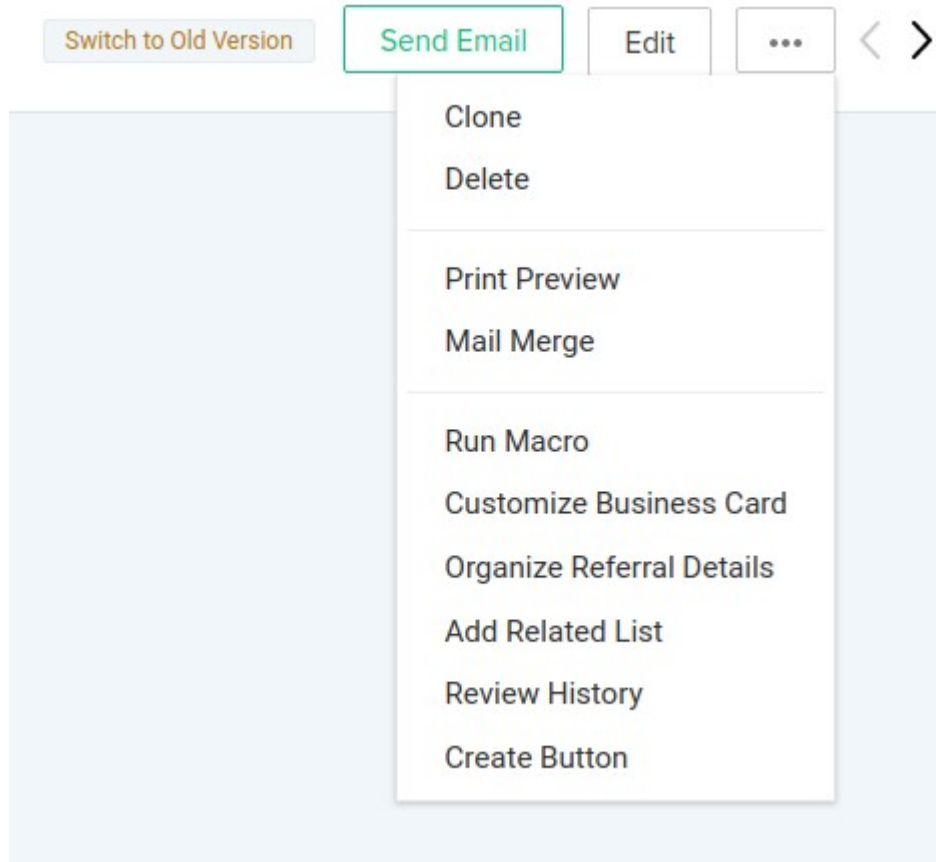


Choose the Referral you want to create the Deal Sheet for. Once inside the Referral record, click the 3 dots in the top right and choose 'Mail Merge'



Choose 'Deal Sheet.docx' from the dropdown, Open with Zoho Writer.

## Mail Merge



Select a Template :

Open with :  Zoho Writer  
 Microsoft Word (Supported only in Internet Explorer 6 and above.)

This will open the template. You do not need edit this here. On the bottom left, make sure that 'Merge as a new Document' is selected and click 'Proceed'

**4. CHOOSE OUTPUT**

- Merge as a new document
- Merge & save as individual files
- Merge & send via email
- Merge & send for sign collection

**5. START MERGING**

- Now
- On schedule

Send email notifications when merge is initiated and completed

Proceed

Once the page loads, you will see the Deal Sheet, now with the data pulled in from the Referral. In the top bar, click 'Distribute'.

COMPOSE REVIEW **DISTRIBUTE**

From here you can download as a PDF and email it to the person in charge of these sheets.

Publish Email Post to Blog Prepare template Upload to sign services Download Print

- Microsoft Word (.docx)
- PDF
- Open Document Text (.odt)
- Rich Text Format (.rtf)
- Text File (.txt)
- Epub Document (.epub)
- HTML (.zip)
- Password Protected File...

Concrete Equipment Group  
A Division of iwi group, LLC  
Equipment ID: 52438  
Referral: 322

Back in the referral scroll down to the related lists, and you will see a section for 'Attachments'. On the right, click 'Attach'. Now this is associated with the Referral.

Emails

+ Send Email

	Received By	Subject	Date	Sent By	Source	Status
	steve@bestpackaging.com	<a href="#">Please find information on the eq...</a>	01:42 PM	Brent Hardie	Workflow Alert	Opened
	joes@sanerrastonecraft..	<a href="#">Please find the listing referral</a>	01:42 PM	Brent Hardie	Workflow Alert	Opened

Attachments

Attach

No Attachment

- Upload File
- Documents
- Zoho WorkDrive
- Zoho Docs
- Google Drive
- Link (URL)

Open Activities

+ Task

+ E

Subject	Activity Type	Status	Due Date	From	To	Call Start Time	Activity Owner	Modified
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